

# **REQUEST FOR PROPOSALS**

## **Microenterprise Assistance Project**

Towns of Ashfield, Becket, Chester, Chesterfield (lead town),  
Cummington, Goshen, Huntington, Middlefield, Peru, Plainfield,  
Russell, Westhampton, Williamsburg and Worthington

**Administering Agent:** Town of Chesterfield  
P.O. Box 299,  
422 Main Road  
Chesterfield, MA 01012

**Contact:** Charlene Nardi, Town Administrator  
[chesterfield.ma@verizon.net](mailto:chesterfield.ma@verizon.net)  
(413) 296-4771

The Town of Chesterfield is soliciting proposals for Consultant Services for a Microenterprise Assistance Project for an eighteen-month period beginning in the fall of 2010 and ending in the spring of 2012. The entity selected will be responsible for the implementation of a Microenterprise Assistance Program, including providing individualized business technical assistance, coordinating workshops on subjects including aspects of business planning, uses of business technology, and marketing for artists and craftspeople, and operating two training sites.

Any questions regarding the proposal should be directed to Charlene Nardi, Town Administrator, Town of Chesterfield, P.O. Box 299, 422 Main Road, Chesterfield, MA 01012, 413-296-4771 or [chesterfield.ma@verizon.net](mailto:chesterfield.ma@verizon.net) by Monday, August 16, 2010.

Proposals in sealed envelopes are due no later than **3:00 PM Tuesday, August 24, 2010** at Town of Chesterfield, PO Box 299, 422 Main Road, Chesterfield, MA 01012.

The Selectmen of the Town of Chesterfield reserve the right to accept or reject any or all proposals in total or in part as they may deem in the best interest of the public. The Town of Chesterfield shall have the right to waive any minor informality or allow the bidder to correct them.

The funding for this program has been applied for from the Economic Development Fund of the Community Development Block Grant Program; awards are made by the Massachusetts Department of Housing & Community Development (DHCD). The grant application proposes approximately \$125,000 for the Microenterprise Assistance Project, including all salaries and benefits, all consultants for technical assistance or classroom training, all training materials and supplies, all rentals of training space, all program advertising, all incidental expenses, all travel, and all provision for office space in the hilltowns. These funds will be used only for business assistance to low and moderate income owners of microenterprises.

Any questions on the proposal must be submitted by email to [Chesterfield.ma@verizon.net](mailto:Chesterfield.ma@verizon.net) by August 16, 2010. Responses to those questions will be answered to all recipients of the RFP by Wednesday, August 18, 2010.

All proposals will receive consideration without regard to race, creed, color, age, sex, sexual orientation, religion, handicap or national origin. In accordance with Section 3 of the *Housing and Community Development Act*, the Town of Chesterfield promotes the employment of local low and moderate income residents.

# **REQUEST FOR PROPOSALS**

## **MICROENTERPRISE ASSISTANCE PROJECT (MAP) SERVICES**

### **INTRODUCTION**

The Town of Chesterfield is seeking a consultant (hereafter called “MAP Consultant”) to implement Microenterprise Assistance Services including: providing individualized business technical assistance; coordinating workshops on subjects including aspects of business planning, uses of business technology, and marketing for artists and craftspeople; and operating two training sites, as defined below. Microenterprises are defined as businesses with five or fewer employees, whose owners have incomes below 80% of the median annual gross household income for the region.

The town of Chesterfield, as lead town for the towns of Ashfield, Becket, Chester, Chesterfield, Cummington, Goshen, Huntington, Middlefield, Peru, Plainfield, Russell, Westhampton, Williamsburg and Worthington, has begun the application process for EDF grant funding for a new Microenterprise Assistance Project for an eighteen month period beginning upon award of funds. The new MAP is intended to build on the success of a prior program, also called the Microenterprise Assistance Project, which served eleven towns and concluded in April of 2010.

The MAP Consultant will deliver the services outlined in this RFP. The consultant will: provide and/or coordinate individualized technical assistance for microenterprises; plan and coordinate business training sessions for microenterprises on many aspects of business planning; plan and coordinate technology-specific training for microenterprises; plan and coordinate business training sessions for artists and craftspeople; and provide and operate two training sites, one in the northern hilltowns (Ashfield, Chesterfield, Cummington, Goshen, Peru, Plainfield, Westhampton, Williamsburg and Worthington) and the other in the southern hilltowns (Becket, Chester, Huntington, Middlefield, Russell). Access to computers for each training session participant must be provided for technology-specific subjects.

It is anticipated that 56 separate business training workshops (encompassing 80 separate three-hour sessions, since some subjects require more than one session) will be offered during the grant period, including 20 workshops on various aspects of business planning, 30 workshops on specific business technology training, and 6 business workshops for artists and craftspeople. It is also anticipated that 80 microenterprises will receive a total of 240 hours of expert technical assistance from the MAP consultant or other consultants, with an average of three contacts per microenterprise, in addition to any training sessions attended.

## **SCOPE OF SERVICES:**

The services to be provided shall include the following:

### **General:**

1. Conduct program marketing and outreach to low and moderate income microenterprises in the fourteen-town region.
2. Establish relationships with providers of training and consulting services, and procure qualified consultants for business planning training, technology training, training for artists and craftspeople, and individualized technical assistance. Maintain procurement records for seven years after close-out of the grant.
3. Maintain CDBG program compliance with income and target area compliance requirements. Insure that every participant completes a Microenterprise Income Certification Form, and that only low and moderate income microenterprises are served.
4. Provide quarterly updates to the Town on the completion status of each of the items outlined in this scope of services.
5. Prepare CDBG quarterly report narrative and data for submission in electronic format by the 10<sup>th</sup> of the month following the quarter end.
6. Assist with program development and grant writing for a subsequent grant application so that the Town is able to continue the program in future years, if funded.
7. Meet regularly with the Town Administrator to update the town of Chesterfield and other stakeholders about Program status.
8. Return all mail, telephone and email messages promptly and no later than one week after contact.
9. Maintain an office within the service area, in private office space which includes space for private consultation with current and prospective microenterprises, and arrange for two training locations within the region for training sessions.
10. Be available on an as-needed basis for client meetings during regular work hours at an office located within the program service area.

### **Individualized Business Technical Assistance:**

1. Meet with clients in a confidential setting to discuss the needs of their businesses, with the goal of assisting microenterprises to start, stabilize, succeed and expand, in accord with the needs and goals of the owners;
2. Assess the business readiness of each client, including the quality of the business idea, their personal readiness to engage in self-employment, their business skills and entrepreneurial traits, and the availability of the necessary financing;
3. Identify specific assistance to be provided to each client, and identify the person who will provide that assistance;
4. Provide, or coordinate and arrange for, the identified one-to-one technical assistance, totaling at least 240 hours, to at least 80 owners of existing or prospective businesses, all of whom are low-to-moderate income (LMI);
5. Follow-up with each assisted client to determine other needs, and to evaluate the technical assistance provided;

6. Maintain written records of every client contact, whether by phone, by email or in person, including the subject matter, the length of the contact, and the next steps to be taken; make these written client records available for review by the Town of Chesterfield upon request.

### **Business Training Workshops:**

1. Procure trainers, workshop locations, and use of computers and projector when necessary, for at least 20 workshops on components of business planning, including market research, legal structure, marketing, internet marketing, financial analysis of businesses, selling and public relations;
2. Procure trainers, workshop locations, and computers and projector when necessary, for at least 30 workshops on specific technologies to assist microenterprises in becoming more profitable and more efficient, such as QuickBooks, Excel, Google Analytics, Website Marketing, Creating a Blog;
3. Procure trainers, workshop locations, and projector for at least 6 workshops specifically for artists and craftspeople;
4. Work with trainers to create, review and/or update curriculum as needed;
5. Provide information to low and moderate income business owners on the available workshops, and advise them about which workshops would be most useful for their situations;
6. Provide workshop evaluation feedback forms for every participant of every workshop, collect the forms and collate the information for the file, share the information with the trainer when appropriate;
7. Procure two workshop sites, one in the Northern Hilltowns and one in the Southern Hilltowns, set up sites for each workshop session and return them to their previous state after each session, and arrange for computers and projector when necessary; offer at least 17 workshops in the Southern Hilltowns;
8. Coordinate all scheduling, marketing, preparation and wrap up of workshops.
9. When a business has a specific need which will not be covered by a workshop, arrange for individualized technical assistance to cover the need.

### **Other:**

1. The MAP Consultant will provide the town of Chesterfield with data and advice related to the preparation of funding applications needed to sustain the program.
2. The MAP Consultant will maintain standards of professional conduct, particularly regarding confidentiality, non-discrimination, drug/alcohol use and sexual harassment.
3. The MAP consultant will produce the deliverables itemized in this Scope of Services according to an annual schedule developed in consultation with the town of Chesterfield, and at a professional standard of quality.
4. The MAP consultant will be responsible for meeting all federal, state and municipal procurement requirements for all services provided, and will be responsible for maintaining all procurement records and program files, spreadsheets, data, etc., for seven years after the close-out of the grant.
5. The MAP consultant must be available to meet with program auditors during or after program close-out.
6. All records are the property of the town of Chesterfield.

## **PROPOSAL REQUIREMENTS:**

Two copies of the proposal must be submitted in a sealed envelope, clearly marked “Microenterprise Assistance Project Consultant Services Proposal”, no later than **3:00 PM on Tuesday, August 24, 2010** to Town of Chesterfield, PO Box 299, and 422 Main Road, Chesterfield, MA 01012. Two copies of a separate price proposal must be provided in a second sealed envelope, clearly labeled “MAP Consultant Price Proposal”.

## **PRICE AND NON-PRICE PROPOSALS MUST BE SUBMITTED SEPARATELY.**

Proposals may be changed prior to but not subsequent to the above date. Modifications to proposals may be submitted prior to the date and time specified for receipt of proposals. Modifications must be submitted in sealed envelopes, clearly marked “MAP Consultant Services - Modification No #\_\_\_.” Mark the outside envelope showing whether the enclosed modification refers to the pricing or non-pricing information.

Each proposal must contain the following information:

1. A table of contents.
2. Experience: A statement of experience, including: experience with CDBG-funded programs; experience in providing one-to-one counseling to very small businesses; experience in administrative duties associated with the coordination of workshops; experience with income verification following MA CDBG rules and regulations;
3. Staff Allocation: Proposals shall contain a detailed breakdown of the proposer’s staff that will be assigned to this project stating the percentage of the total number of hours that will be spent by the listed staff members. Resumes of all staff must be included.
4. Subcontractors: The proposal shall contain information pertaining to any sub-consultant services which the proposer may use in the performance of the Scope of Services. The information to be included shall be:
  - a. Name of firm
  - b. Phase of work or involvement
  - c. Firm qualifications
  - d. Principals of the firm
  - e. Staff assignment (project only)
  - f. Resumes of assigned staff
5. Certification: A signed non-collusion and tax certification (see form attached).

6. References: A list of names and phone numbers for at least three current references.
7. Schedule: A commitment as to time available to begin work. Provide a schedule indicating ability to perform work within the stated program time frame of eighteen months.

**Please submit prices on Attachment B (the "Price Proposal"). Be sure to sign this form.**

**PRICE MUST BE SUBMITTED IN A SEPARATE, CLEARLY MARKED ENVELOPE.**

## **EVALUATION CRITERIA:**

The successful applicant must have a demonstrated ability to work with a wide variety of people; must be well organized; must have good communication skills and must be willing and able to comply with complex bureaucratic regulations. The Town of Chesterfield will evaluate all proposals on the basis of the following evaluation criteria. You do not have to rank your own proposal.

### **MINIMUM EVALUATION CRITERIA:**

- 1) Proposals must address all eight (8) items listed in the Proposal Requirements section in order to receive consideration.
- 2) The successful applicant must have a minimum of three years of relevant small business counseling experience.
- 3) The applicant must be familiar with the Massachusetts CDBG income verification criteria.
- 4) The applicant must be available on an as needed basis to the Town, and must be available for client meetings during regular work hours at an office located within the program service area. The address of the proposed office should be listed; the office must be located in private office space located within the service area.

### **COMPARATIVE EVALUATION CRITERIA:**

The Town of Chesterfield will rank each proposal according to the following scale: unacceptable, not advantageous, advantageous or highly advantageous on the basis of the following criteria. The applicants receiving an advantageous rating or better in categories 1 - 6 and who have met all minimum evaluation criteria may be interviewed for the position.

1. Experience with CDBG-funded Programs or equivalent experience. Five (5) or more years of experience will be considered as highly advantageous; less than one year of CDBG or equivalent experience will be considered unacceptable.

|                     |  |
|---------------------|--|
| Highly advantageous | Five (5) or more years experience.                                     |
| Advantageous        | Three years or greater (3) but less than five (5) years of experience. |
| Not advantageous    | One year or greater (1) but less than three (3) years of experience.   |
| Unacceptable        | Less than one year of experience.                                      |

2. Experience in providing one-on-one counseling related to business planning, business processes, business formation, small business financial analysis, small business marketing.

Five (5) or more years of experience will be considered as highly advantageous; less than one year of experience will be considered unacceptable.

|                     |  |
|---------------------|--|
| Highly advantageous | Five (5) or more years experience.                                     |
| Advantageous        | Three years or greater (3) but less than five (5) years of experience. |
| Not advantageous    | One year or greater (1) but less than three (3) years of experience.   |
| Unacceptable        | Less than one year of experience.                                      |

3. Experience in administrative duties associated with coordination of workshops or other equivalent experience.

Five (5) or more years of experience will be considered as highly advantageous; less than one year of experience will be considered unacceptable.

|                     |  |
|---------------------|--|
| Highly advantageous | Five (5) or more years experience.                                     |
| Advantageous        | Three years or greater (3) but less than five (5) years of experience. |
| Not advantageous    | One year or greater (1) but less than three (3) years of experience.   |
| Unacceptable        | Less than one year of experience.                                      |

4. MA CDBG Income Verification Experience. Five (5) or more years of experience will be considered as highly advantageous; less than one year of experience will be considered unacceptable.

|                     |  |
|---------------------|--|
| Highly advantageous | Five (5) or more years experience.                                     |
| Advantageous        | Three years or greater (3) but less than five (5) years of experience. |
| Not advantageous    | One year or greater (1) but less than three (3) years of experience.   |
| Unacceptable        | Less than one year of experience.                                      |

5. References. A minimum of three references (names and phone numbers must be provided) to illustrate past performance, regarding your ability to counsel small businesses.

|                     |                                    |
|---------------------|------------------------------------|
| Highly advantageous | Two or three excellent references. |
| Advantageous        | Two or more good references.       |
| Not advantageous    | One or more fair references.       |
| Unacceptable        | One or more poor references.       |

6. Availability. Ability to begin within ten (10) days of notice of funding will be considered as highly advantageous; start-up delay beyond twenty-one (21) days will be considered as unacceptable.

|                     |  |
|---------------------|--|
| Highly advantageous | Start-up within (10) days of notice to proceed.  |
| Advantageous        | Start-up greater than or equal to ten (10) days but less than fifteen (15) days of notice to proceed.        |
| Not advantageous    | Start-up greater than or equal to fifteen (15) days but less than twenty-one (21) days of notice to proceed. |
| Unacceptable        | Start-up beyond twenty-one (21) days of notice to proceed.   |

7. Communication Skills. Ability to communicate well with others, especially with owners of very small businesses, will be evaluated in a personal interview. Excellent communication skills will be considered highly advantageous; poor communication skills will be considered unacceptable.

|                     |                                 |
|---------------------|---------------------------------|
| Highly advantageous | Excellent communication skills. |
| Advantageous        | Strong communication skills.    |
| Not advantageous    | Fair communication skills.      |
| Unacceptable        | Poor communication skills.      |

8. Unique Qualifications. Indicate qualifications which make you uniquely able to work with low/moderate income people in a publicly funded program. Statement of unique qualifications can be made in writing or in a personal interview. Having three or more unique qualifications will be

considered highly advantageous. Unique qualifications may include: a) previous work with low and moderate income owners of existing and prospective businesses; b) experience helping low and moderate income microenterprise owners with financial analysis, business planning and business marketing.

|                     |                                      |
|---------------------|--------------------------------------|
| Highly advantageous | Three or more unique qualifications. |
| Advantageous        | Two unique qualifications.           |
| Not advantageous    | One unique qualification.            |
| Unacceptable        | No unique qualifications.            |

Selection of a proposal for contract award will be based on the information gathered from the interview, the qualifications of the individual delivering the program services, the Comparative Evaluation Criteria ranking, and the price proposal.

## **CONTRACT TERMS**

- The successful applicant will enter into a standard Massachusetts CDBG Program Management services contract. A draft boilerplate contract is available for review from the town of Chesterfield. This Request for Proposals and Scope of Services will be incorporated into the contract by reference.
- The consultant will indemnify and hold the town of Chesterfield and DHCD harmless against any claims that may arise out of the performance of the duties under the contract.
- Acceptance of any proposal to provide services is subject to the availability of funds from the Economic Development Fund of the CDBG Program.
- The contract for services will run for a total period of eighteen months, commencing on or about October 1, 2010 and ending on or about March 31, 2012. Contract award is dependent upon funding availability. The town of Chesterfield reserves the right to terminate this contract if funding does not permit maintaining a MAP Consultant for the full eighteen months.
- Payments shall be made within 30 days of receipt of invoice on the consultant's letterhead. All invoices shall list and include only services already provided. No payment shall be made in advance of provision of services.
- The town of Chesterfield reserves the right to reject any or all proposals as it may deem in the best interest of the public.
- The town of Chesterfield reserves the right to waive minor discrepancies or permit a proposer to clarify such discrepancies and so conduct discussions with all qualified proposers in any manner necessary to serve the best interests of the Town of Chesterfield and the towns that it represents. The town of Chesterfield also reserves the right to award a contract based on written proposals received without prior discussions or negotiations.

**THE TOWN OF CHESTERFIELD IS AN EQUAL OPPORTUNITY EMPLOYER**

**ATTACHMENT A**

**NON-COLLUSION AND TAX CERTIFICATIONS**

Bid #: \_\_\_\_\_ for \_\_\_\_\_

The undersigned certifies under penalties of perjury that this bid has been made and submitted in good faith without collusion or fraud with any other person. As used in this certification, the word “person” shall mean person, business, partnership, corporation, union, committee, entity, or group of individuals.

\_\_\_\_\_  
(Name of person signing bid)

\_\_\_\_\_  
(Signature of person signing bid)

\_\_\_\_\_  
(Name of business)

Pursuant to M.G.L. ch 62 C, Sec. 49A, I certify under the penalties of perjury that I, to my best knowledge and belief, have filed all state tax returns and paid all taxes required under law.

\_\_\_\_\_  
(Social Security or EIN Number)                      \_\_\_\_\_  
(Signature of Individual or Corporate Name)

By: \_\_\_\_\_  
Corporate Office (if applicable)

Any person or corporation that fails to execute these attestation clauses shall not be awarded this bid. Submission of a social security or federal identification number is voluntary.

**ATTACHMENT B**

**PRICE PROPOSAL FORM**

**Microenterprise Assistance Project (MAP):**

Dates are approximate

*10/1/10 – 3/31/12*

**TOTAL \$ AMOUNT OF PRICE PROPOSAL, not to exceed**

\_\_\_\_\_

**The price above includes all activities listed in the Scope of Services**

Submitted By:

\_\_\_\_\_  
Name (printed)

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Name of Business

\_\_\_\_\_  
Date